




# CourtLink<sup>®</sup> eFile

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## **QUICK GUIDE:** NEW CASE FILING

The Fileroom Quick Guide provides a convenient source of information to help you efficiently file a new case electronically.

## Quick Tips Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using CourtLink® eFile to ensure you are in compliance with local requirements. Copies of the rules can be found on [www.lexisnexis.com/courtlink](http://www.lexisnexis.com/courtlink) under **Courts Online/CourtLink eFile** or within the CourtLink eFile application under **Support**.
2. Service of Original Summons and Complaints, Petitions and other new case information must be done traditionally once a case is opened and accepted by the Court Clerk's office. Additional information is available from LexisNexis™ CourtLink® on this service of process. Please contact your account manager if you require additional details.
3. **Help** is available on the top right of each screen. When on any page of myCases, File & Serve, and Search Filings, click the **Help** button. 
4. Check our system requirements on [www.lexisnexis.com/courtlink](http://www.lexisnexis.com/courtlink) to be sure your computer is correctly configured for using CourtLink eFile.
5. CourtLink eFile is divided into 3 separate areas. Become familiar with the functions of the 3 main areas to help you navigate through the application:
  - a. **File & Serve** – Where you **send** documents to the court and opposing counsel.
  - b. **Fileroom** – Where you **retrieve** documents and new service information
  - c. **Information Desk** – Where you **maintain** personal, firm and case status information
6. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
7. Hyperlinks take you to additional information – don't forget to use them!
8. When running searches, less is more. Only enter partial information to get the most results.
9. The fastest way to access a filing is with a Filing ID.
10. When using CourtLink eFile for the first time, or if you need assistance contact our Customer Support team at 1-888-529-7587.

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## HOW TO LOG ON TO CourtLink eFile

1. Before using CourtLink eFile, you must have a user name and password. If you do not have these, contact our Customer Service.
2. Using Microsoft® Internet Explorer or Netscape® Navigator®, open your browser and go to [www.lexisnexis.com/courtlink](http://www.lexisnexis.com/courtlink).
3. When the home page appears, Click **Logon** under CourtLink eFile. The CourtLink eFile Log on page appears.
4. Enter your assigned user name and password and click **Submit**. myCases will open.

## FILE & SERVE: START FILING

There are 5 easy steps to e-filing a new case via CourtLink eFile. Each of these steps is detailed in this Quick Guide:

1. **Start Filing** - Allows you to select a case or cases to file into.
2. **Documents** - Lets you select the type of document you are filing and attach your documents.
3. **Case Parties** - Allows you to enter parties named in the case.
4. **Review & Submit** - Review your work and submit to the court.

**File & Serve** Select Court and/or Case for Filing

☒ File and/or Serve in an existing case
 ☐ File a new case
 ☐ File and/or Serve in multiple cases

Enter information in one or more boxes and click **Find**.

State:  Case Name:   
 Court:  Case Number:   
 County:

**Find** **Advanced Search** ?

To select a case for filing, click beside the case.

Case List	1 through 1 of 1	Return	50	records		
Case Number	Case Name	Case Type	Case Class	State	Court	County
000002	Jones vs Car Manufacturers Corp et al	Personal Injury	Civil	TX	Mock Court	

1 through 1 of 1

### START FILING

1. To begin the filing process, click **File & Serve**. The *Start Filing* tab appears.
2. To **File in a new case**, click the radio button titled *file a new case*.
 

**Note:** A new case is a case that does not have a case number assigned by a court clerk.
3. From the drop down menu, select the court in which you choose to file, click **Find**.
4. Courts accepting new cases electronically will appear in the list.
5. To select a court and case class (i.e. Civil, Domestic Relations, Probate, Water, etc), click the box to the left of the desired court name and class.
6. On the next screen, enter the **case name** and select the **case type** you are filing from the drop-down menu.

The screenshot shows the LexisNexis CourtLink eFile interface. At the top, there's a header with the LexisNexis logo, 'file & serve' text, and buttons for 'Log off', 'Help', and 'User: Adam Attorney Mock Plaintiff Firm'. Below the header, a red banner says 'Start Filing'. The main area is titled 'Add New Case' with 'Cancel' and 'Save' links. A sidebar on the left contains navigation links: 'file room', 'myCases', 'Search Filings', 'Build Reports', 'information desk', 'User Profile', 'Firm Profile', 'Case Profile', and 'Support'. The main form area has instructions: 'Enter a case name and select a case type. Then click Submit.' It includes fields for 'Court' (Mock Court), 'Case Class' (Civil), 'Case Name' (Smith, Sue v Asbestos Defendants), and 'Case Type' (Personal Injury). There are 'Submit' and '?' buttons at the bottom of the form.

Tips for entering a case name:

- Only enter the abbreviated form of a case name. Do not list each party. (i.e. Smith, Sue v Asbestos Defendants)
- If the plaintiff is an individual, enter "*last name, first name* v. defendant name". Defendants do not need to be last name, first name.

*Examples:*

- Smith, Sue v. Asbestos Defendants et al
- Brown, Jack v. Bob White et al
- ABC Corporation v. Airline Industries et al

## FILE & SERVE: DOCUMENTS

**LexisNexis eFile** file & serve Log off Help User: Adam Attorney Mock Plaintiff Firm

TIME: 2:52 PM ET Start Filing Case Documents Case Parties Review & Submit

**File & Serve** Filing ID: 639398 Cancel Save

**Attach Documents**  
 Smith, Sue v Asbestos Defendants Mock Court

For each document, complete each field and click **Attach Document**. A (\*) indicates a document type that may be an originating document; a (\*\*) indicates a document type that may be an originating or subsequent document; filing types with no asterisk are valid subsequent filing types for this court.

Type: Complaint \* Court Fee: \$100.00

File: C:\Documents and Settings\ksmith\COURT Browse...

Title: Plaintiffs Original Complaint

Access: Public Attach Document ?

To view a document, click the title. To remove a document, click for the document. To identify any [supporting document](#) select the ID of the main document it supports from the drop-down list in the *Main/Supporting* column. To link a document to a previously filed document, click in the *Link* column.

**Attached Documents List** [Update Status](#)

No Documents Currently Attached

### SELECTING DOCUMENTS TO FILE

1. Select a filing type for your document from the **Type** drop down menu. Filing types with an asterisk (\*) denote acceptable filing types to open a new case. (i.e. Complaint, Petition)
2. Click the **Browse** button in the **File** section to browse your computer files and locate the document you are submitting.
3. Enter a title for your document in the **Title** field. The title must comply with local rules for electronic filing and should not contain any punctuation.
4. Next select an Access type for your filing, Public or Sealed:
  - a. **Public:** The document is a publicly filed instrument.
  - b. **Sealed:** The system only places a placeholder in the CourtLink eFile docket. You must deliver the actual document in hard copy to the court. Refer to your specific court rules to see if this is permissible.
5. Click **Attach Document**. The document will appear in the *Attached Documents List*.
6. To add more documents, repeat steps 1-5. The initiating document must be properly identified if you are filing more than one document in the transaction. Only the initiating document can open a new case.

**File & Serve**

**Attach Documents**  
 Smith, Sue v Asbestos Defendants Mock Court  
 Filing ID: 639398 Cancel Save

For each document, complete each field and click **Attach Document**. A (\*) indicates a document type that may be an originating document; a (\*\*) indicates a document type that may be an originating or subsequent document; filing types with no asterisk are valid subsequent filing types for this court.

Type:   
 File:   
 Title:   
 Court Fee: None  
 Access:   
 Attach Document ?

Identify the case-initiating document by clicking the option button beside it in the first column. To view a document, click the title. To remove a document, click for the document. To identify any supporting document select the ID of the main document it supports from the drop-down list in the *Main/Supporting* column. To link a document to a previously filed document, click in the *Link* column.

**Attached Documents List** [Update Status](#)

Initiating Document	Link	Document ID	Document Title	Main/Supporting	Filing Type	Conversion Status	Access Type	Remove
		706485	Plaintiffs Original Complaint	Main	Complaint *	Converting	Public	

- When filing supporting document, use the *Main/Supporting* to reflect the document association. In the column by each supporting document, select the document ID for the main document to which it supports.
- If you need to remove or replace a document, click the corresponding in the **Remove** column.
- When all documents have been attached and associated, click the *Case Parties* tab to continue.

## FILE & SERVE: CASE PARTIES

**File & Serve**

**Add Case Parties**  
 Smith, Sue v Asbestos Defendants Mock Court  
 Filing ID: 639398 Cancel Save

Enter or select information for each party you want to add to this case. Then click **Add Party**.  
 To edit a party, select the party from the **Party List**.

☒ **Initiating Party Information** or ☐ **Additional Party Information**

\* Party:   
 First Name:  Middle Name:   
 Last Name:   
 \* Party Name:   
 \* Attorney:   
 \* Entity:   
 \* Attorney Type:   
 Add Party Find Party ?

**Party List**

### ADD INITIATING PARTIES TO CASE:

- Select **Initiating Party Information** from the radio buttons. Initiating parties are the clients your office represents in the case. All required fields are red and asterisk (\*). Some courts require

additional information be provided. For example: Address Information, City, State and Zip. If those fields are required, then they will appear on your screen.

2. Select a **Party Type** from the drop-down menu.
3. Select an **Entity Type** from the drop-down menu (Individual or Organization).
4. Enter the party name in the fields available. (*Note: In all Courts except Colorado, you should try to **Search** for party names to add to cases prior to entering them in manually to avoid duplicate entries, mis-spellings, etc. See steps to **Search for Party Names** below.*)
5. Click **Add Party**. The party name appears under the **Party List**.
6. To add additional parties (parties other than the initiating party) Click Add New Party and proceed to next Section "Add Additional Parties".

### SEARCH FOR PARTY NAMES:

The screenshot displays the 'File & Serve' section of the CourtLink eFile interface. At the top, there's a navigation bar with 'file & serve' and buttons for 'Log off', 'Help', and 'User: Adam Attorney Mock Plaintiff Firm'. Below this is a 'TIME: 2:55 PM ET' and a 'Start Filing' button. The main area is titled 'File & Serve' and contains a search form. The form has a text input for 'Party Name' with 'Owens' entered, a dropdown for 'Party Type' set to 'Organization', and 'Find' and 'Cancel' buttons. Below the form, a message says 'Select the party you wish to add to the case. Change you search criteria find another party.' A table of results follows, with columns for 'Party Name' and a list of companies: 'Libbey Owens Ford Glass Co', 'Owens & Minor Medical Inc', 'Owens Corning Corp', 'Owens Corning Fiberglas Corp', 'Owens Illinois Glass Co', and 'Owens Illinois Inc'. At the bottom of the table, it says '6 found.' On the right side, there's a 'Party List' sidebar showing 'Smith, Sue' and 'Asbestos Defendants'.

You should search for a party name in CourtLink eFile prior to entering it in. To search/find a party:

- Follow steps 1-4 above.
- Click **Find Party** and a Search Screen appears.
- Click the Entity Type to search and click **Find**.
- All parties with that name are displayed.
- If your party name is in the list, click on the name to select
- The party name is added to the name field under *Case Parties*.
- Click **Save Party**.
- To add another new party, click **Add New Party**.

**NOTE:** Party names are stored in CourtLink eFile using standard naming conventions. They serve as a placeholder only. Exact legal names, addresses, DOB and SS# information is not required nor stored for each party so that our clients have flexibility when searching for party names to add to the CourtLink eFile case parties lists. Your pleadings, however, should contain the

proper identification of parties sued. If you have any questions about the names or searching for names, please contact our Customer Service Center.



## ADD ADDITIONAL PARTIES TO CASE:

1. To add additional parties to a case, select the **Additional Party Information** radio button. Additional parties are all parties that you are naming in the suit that are not represented by your office.
2. Select a Party Type from the drop-down menu.
3. Select an Entity Type from the drop-down menu (Individual or Organization).

**NOTE: When adding a new party, follow these simple rules:**

- Do not include "The" in company names
- Use "&" instead of the word "and"
- Avoid punctuation in company names
- Always abbreviate Inc., Corp., Co.
- If you want to add aliases (dba's and aka's), add them as separate parties
- Place a space between parties with Initials in the name (i.e. A W Chesterson, A P Green, A I S Insurance)

4. Search for or Enter the party name in the fields available (see Search Steps above).
5. Click **Save Party**. The party name appears in the Party List on the right.
6. To add another new party, click **Add New Party**.

**NOTE: Designating an attorney to represent Additional Parties is not required.**

7. To remove or edit a party, click the name on the Party List, then remove the party or make edits and save the changes.
8. Click the *Review and Submit* tab.

# FILE & SERVE: REVIEW AND SUBMIT

**File & Serve** Review and Submit Filing ID 639398 [Cancel](#) [Save](#)

**Case Parties**

Filing ID: 639398  
 Filed by: Adam Attorney  
 Mock Plaintiff Firm  
 Court: Mock Court  
 Division/Courtroom: N/A  
 Case Class: Civil Case Type: Personal Injury  
 Case Number: Case Name: Smith, Sue v Asbestos Defendants

Conversion Status	Initiating Document	Linked Docs	Filing Type	Document Title	Document ID	Main/Supporting	Access Type	Filing Fee	Pages	Original File
Converted	Yes		Complaint	<a href="#">Plaintiffs Original Complaint</a>	706485	Main	Public	\$100.00	2	

**Complete Your Filing**

1. Select an individual to authorize the filing.  
 Authorizing Attorney: Adam Attorney

2. Add billing reference (optional). This reference will appear on your invoice  
 123.456

3. Choose to file now, or schedule the filing for later release.  
☒ Authorize and file now  
☐ Authorize and file on mm/dd/yyyy at hh:mm AM/PM

4. Click **Submit**.

**Submit**

## AUTHORIZING AND SUBMITTING THE FILING

1. Check all information on the filing summary.
2. Make any changes to the filing on the appropriate tab; then return to the *Review and Submit* page.
3. From the drop down menu select the name of the individual authorizing the filing.
4. Enter any billing information you wish to appear on your invoice.
5. You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be submitted.
6. Click **Submit**.
7. A CourtLink eFiling receipt appears containing your date and time of filing “stamp”, print a copy for your records.

Once the Court Clerk reviews the filing, you will receive an email containing the case number, judge assignment, and other pertinent information. Remember to complete Service of Process traditionally. For more information on Service of Process of e-filed documents, contact your account manager.